



**Grand County**  
Colorado



# Tourism Revitalization Plan

**Public Meeting #1**

JUNE 7, 2023



# Agenda

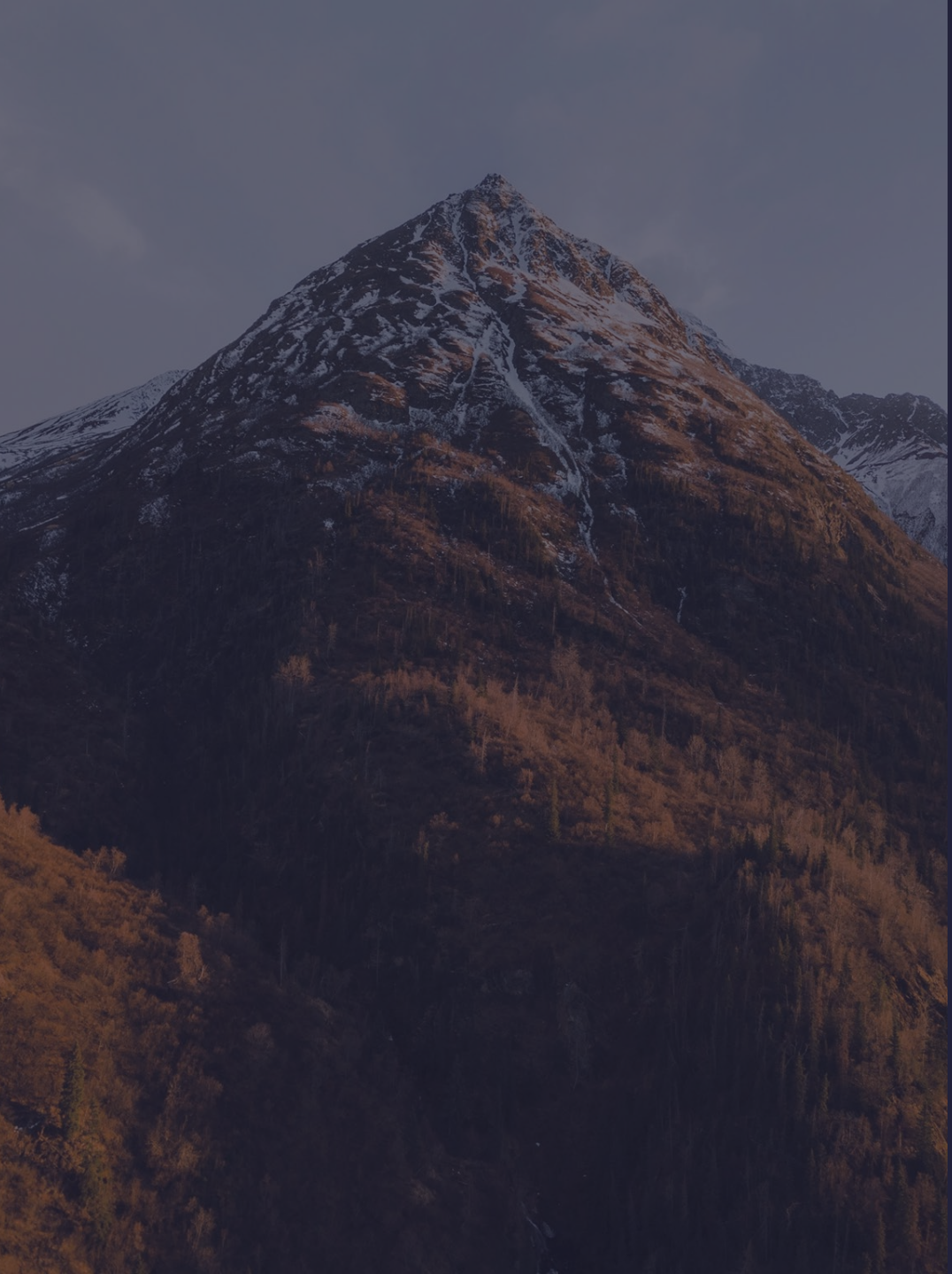
**Project Team**  
**Vision Statement**  
**Project Goals**  
**Tourism at a Glance**

**What's Happening**  
**Where It's Happening**  
**Challenges**  
**Next Steps**



**Grand County**  
Colorado





# Project Team



**Grand County**  
Colorado



**Eric Neagu**  
PE, LEED AP, AICP  
*Principal-in-Charge*



**Michael Schmitz**  
*Principal*



**Vita Khosti**  
*Project Manager*



**Chris Brown**  
*Project Manager*



**Scott Pouders, AICP**  
*Senior Planner*



**Mindy Smith**  
*Project Planner*



**Genevieve Gunther, PE**  
*Project Engineer*

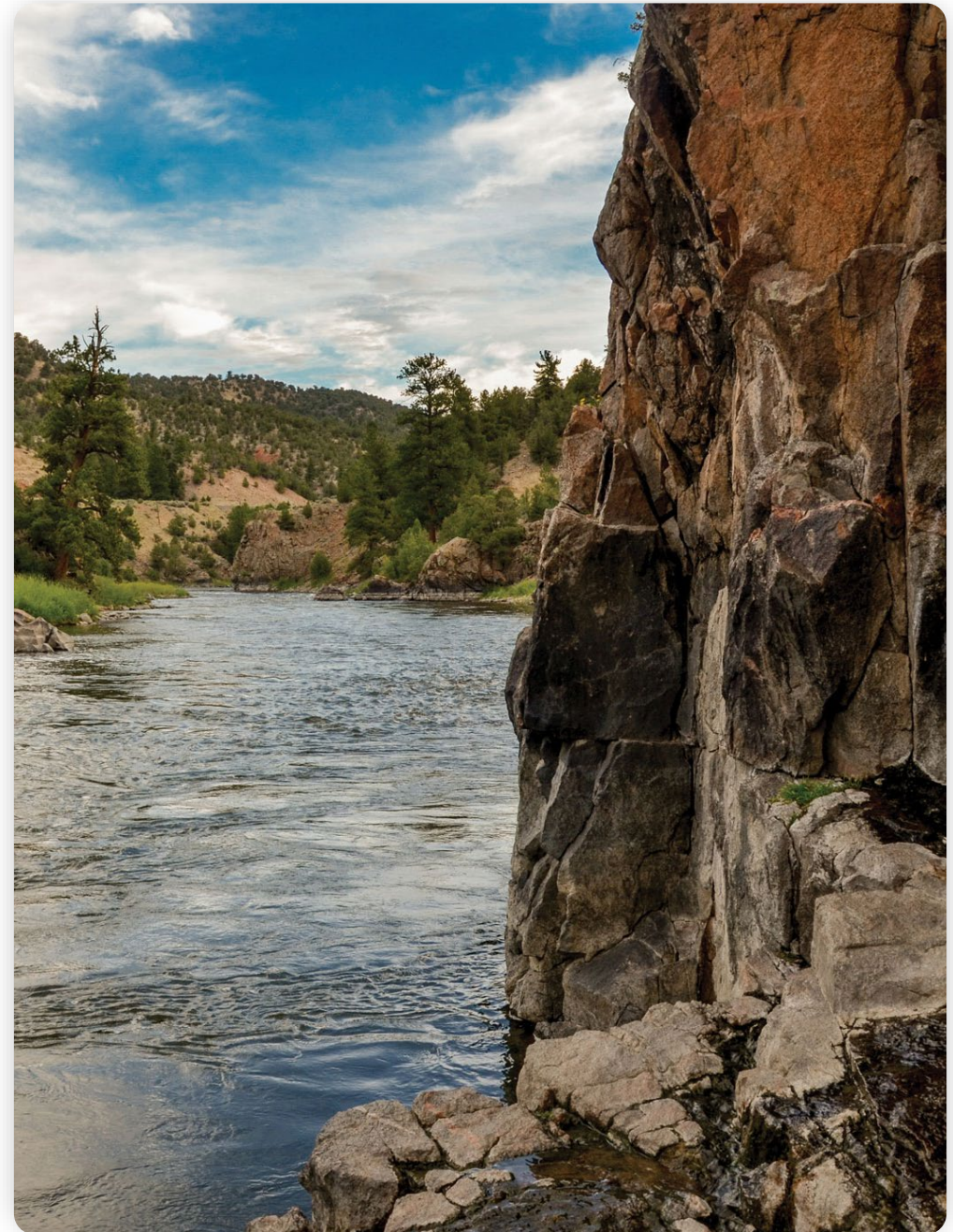


**Meara McQuain**  
*Executive Director*



# Vision Statement

Grand County will create an environment for **sustainable tourism to thrive**, while maintaining the community's **identity, natural resources, and local economy**. Tourism will provide a catalyst for **improving and enhancing services**, with consideration to local character and capacity; **building an equitable and sustainable community**.



# Project Goals

GRAND COUNTY TOURISM  
REVITALIZATION PLAN



Promote sustainable  
travel experiences year-  
round throughout Grand  
County



Strengthen local  
economies for long-term  
resilience



Protect the environment  
and natural resources



Improve quality of life for  
Grand County residents  
through equitable  
benefits of the tourism  
industry



Job and revenue  
generation beyond the  
visitor economy



Champion sustainable  
infrastructure  
(water, energy, waste  
management)



Prioritize tourism related  
infrastructure





# Tourism

## AT A GLANCE

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GRAND COUNTY TOURISM  
REVITALIZATION PLAN

# Tourism at a Glance

GRAND COUNTY TOURISM  
REVITALIZATION PLAN



**90**

Million

International  
Visitors  
Annually  
By 2027

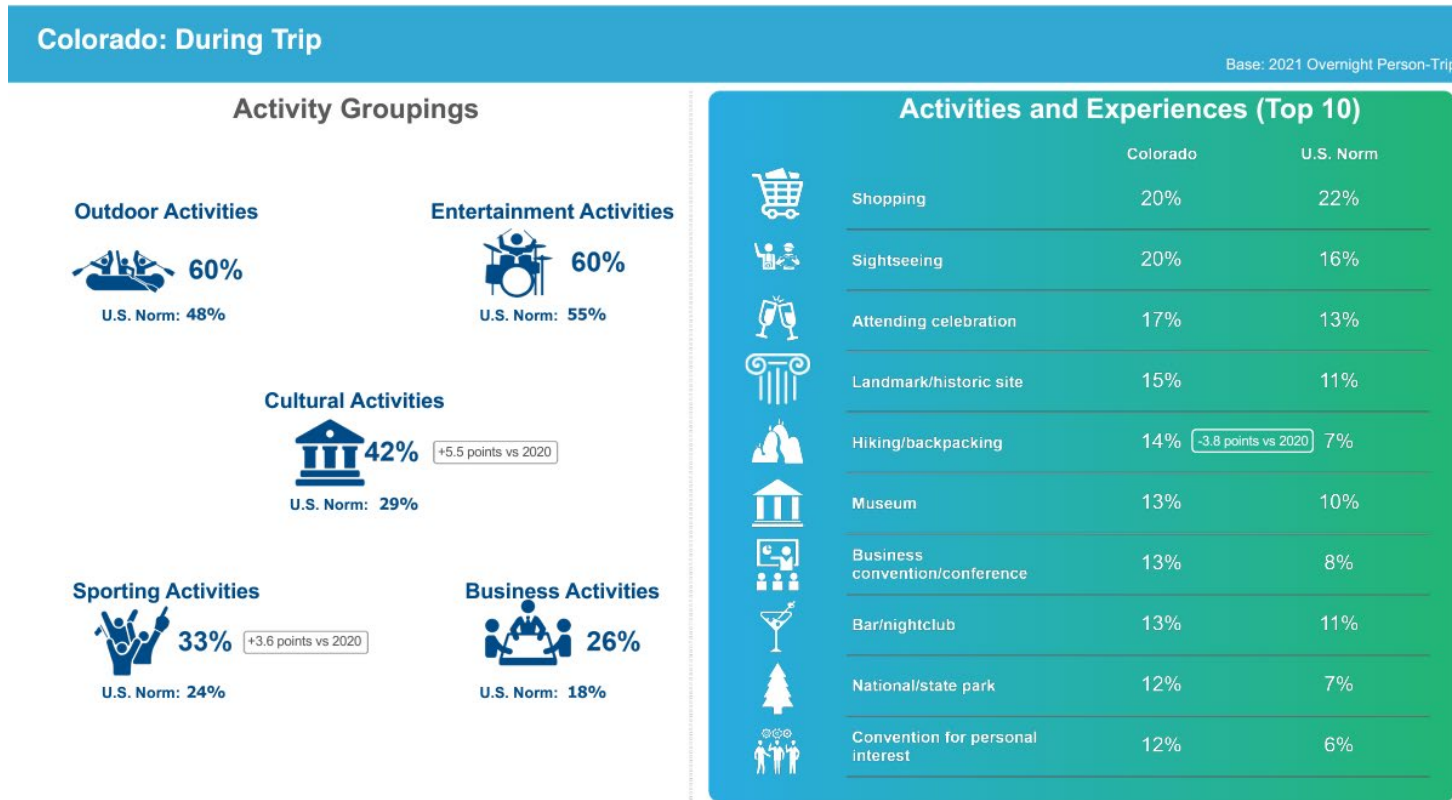


**"1 in every 20 jobs in the United States either directly or indirectly supported by travel and tourism."**

## United States Tourism Industry

- ✓ **\$1.9 trillion in tourism revenue** in 2019, accounting for **2.9% of US GDP** and creating a **\$53.4 billion trade surplus**. Following the pandemic, the tourism industry quickly rebounded with **GDP over \$23 billion (2.15% of total US GDP)**.
- ✓ The United States Department of Commerce is developing a plan to increase tourism; plans to welcome **90 million international visitors annually** by 2027.

# Tourism at a Glance



## Colorado Tourism Industry

According to the Colorado Tourism Office 2021-2022 fiscal report, Colorado:

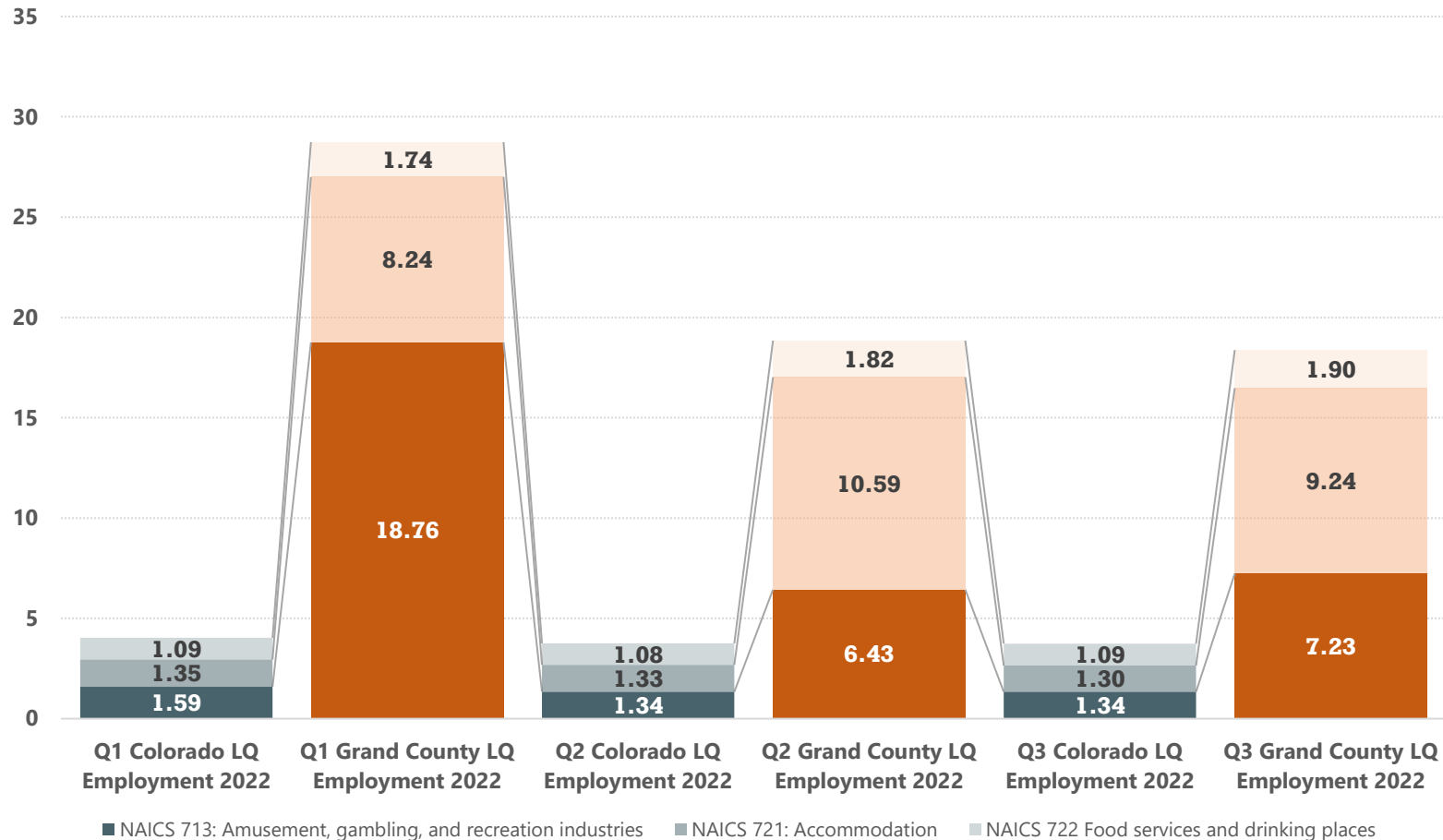
- ✓ **Welcomed 82.4 million visitors**
- ✓ **Created 160k jobs**
- ✓ **Earned \$21.9 billion** from direct travel spending.

**7.7% of the nation's tourism jobs** and only 1.7% of the US population.



# Tourism at a Glance

Location Quotient Employment by Sector



Source: US Bureau of Labor Statistics

## Colorado Location Quotient

- Location quotients (LQ) are ratios that compare local employment to the United States average.
- If a LQ is above 1, it indicates an industry with a greater share of the local area employment than is the case nationwide.



# What's Happening IN GRAND COUNTY

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Community



Economy

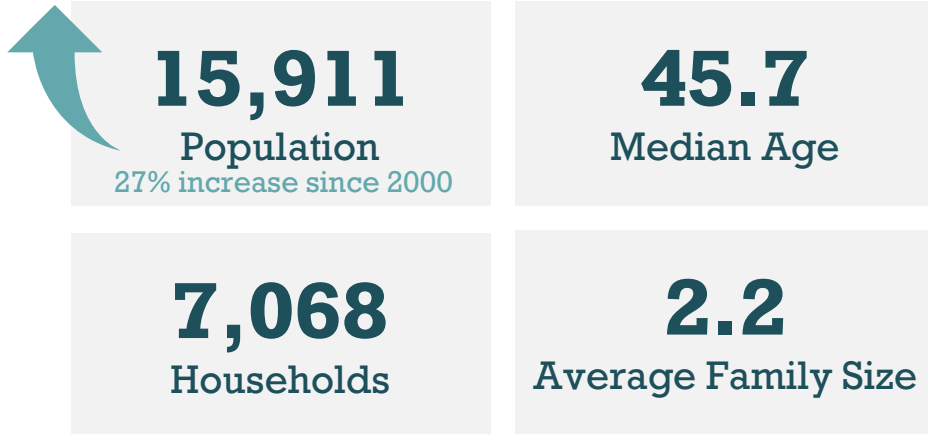


Housing

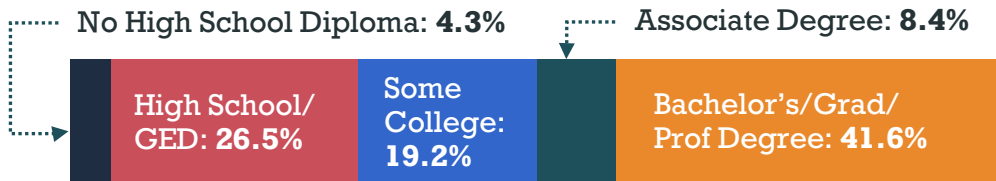
GRAND COUNTY TOURISM  
REVITALIZATION PLAN

# Community Snapshot

## KEY FACTS

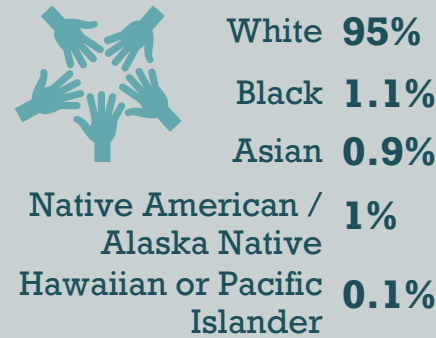


### Education

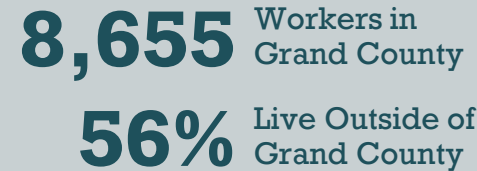


Sources: US Census Bureau 2021: ACS 5-Year Estimates

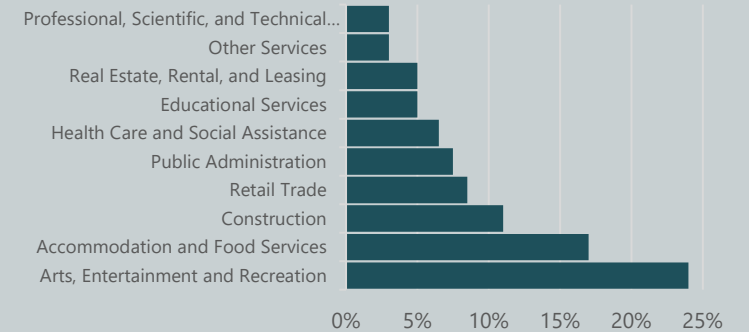
### Race & Ethnicity



### Workforce



### Top Ten Industries



### Income & Housing



# Top Industries

**Industries related to tourism make up almost 50% of all local businesses.**

Source: US Census Bureau 2021: ACS 5-Year Estimates

Industry	
Arts, Entertainment, and Recreation	24.0%
Accommodation and Food Services	16.7%
Construction	10.8%
Retail Trade	8.7%
Public Administration	7.9%
Health Care and Social Assistance	7.0%
Educational Services	5.0%
Real Estate and Rental and Leasing	4.8%
Other Services (excluding Public Administration)	2.6%
Professional, Scientific, and Technical Services	2.6%



Community



Economy



Housing

# Top Employers

**Many of the top 20 employers in Grand County are in the tourism industry, further highlighting tourism's necessity.**

Sources: ESRI, US Census Bureau ACS 2016-2020

Largest Area Employers	Employees	Location
Winter Park Resort	1,500	Winter Park
C Lazy U Ranch	150	Granby
Fraser Valley Metropolitan	100	Fraser
City Market	100	Granby
Farmhouse G L	100	Grand Lake
Safeway	85	Fraser
US Forestry Department	80	Granby
Alpine Peaks Inc A Prop Mgmt	80	Winter Park
Lodge at Sunspot Restaurant	77	Winter Park
Winter Park Mountain Lodge	75	Winter Park
Roofing Co	70	Granby
Middle Park Health – Kremmling	62	Kremmling
West Portal Station	60	Winter Park
Deno's Mountain Bistro	60	Winter Park
Hi Country Haus Condominiums	60	Winter Park
Mountain Parks Electric	51	Granby
Middle Park High School	50	Granby
Granby Ranch Ski School	50	Granby
First Transit Inc	50	Winter Park
Vintage Hotel	50	Winter Park



Community



Economy

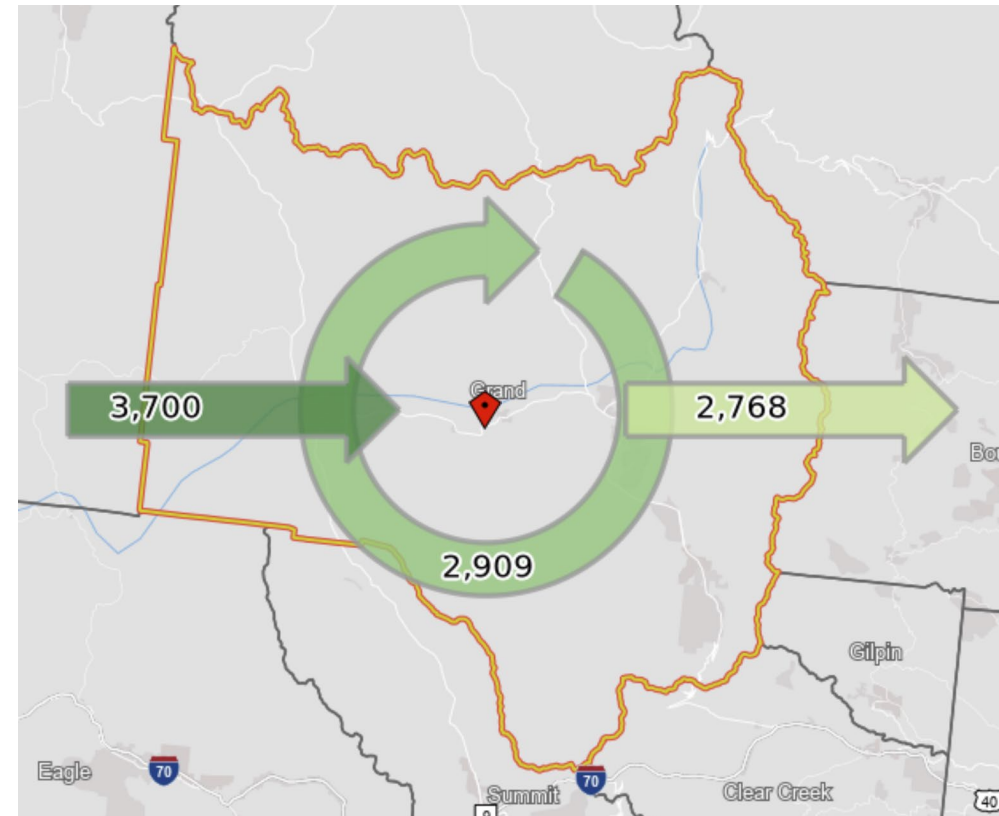


Housing

## 6,609 people are employed in Grand County.

3,700 of these people don't live within the county, accounting for **56% of Grand County's workforce.**

Source: US Census Bureau 2021: On the Map



Community



Economy



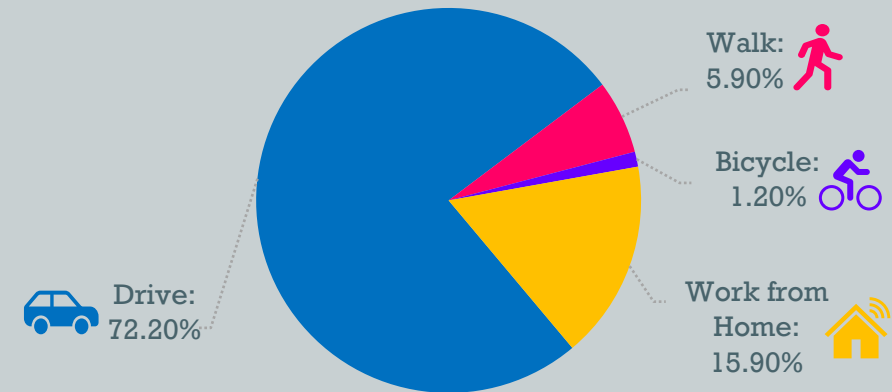
Housing

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Source: US Census Bureau 2021: On the Map

### Means of Transportation to Work



<b>Car, Truck, Van</b>	<b>72.20%</b>
Drive Alone	66.30%
Carpooled	5.90%
Public Transportation	4.90%
<b>Walked</b>	<b>5.90%</b>
<b>Bicycle</b>	<b>1.20%</b>
<b>Work from Home</b>	<b>15.90%</b>



Community



Economy



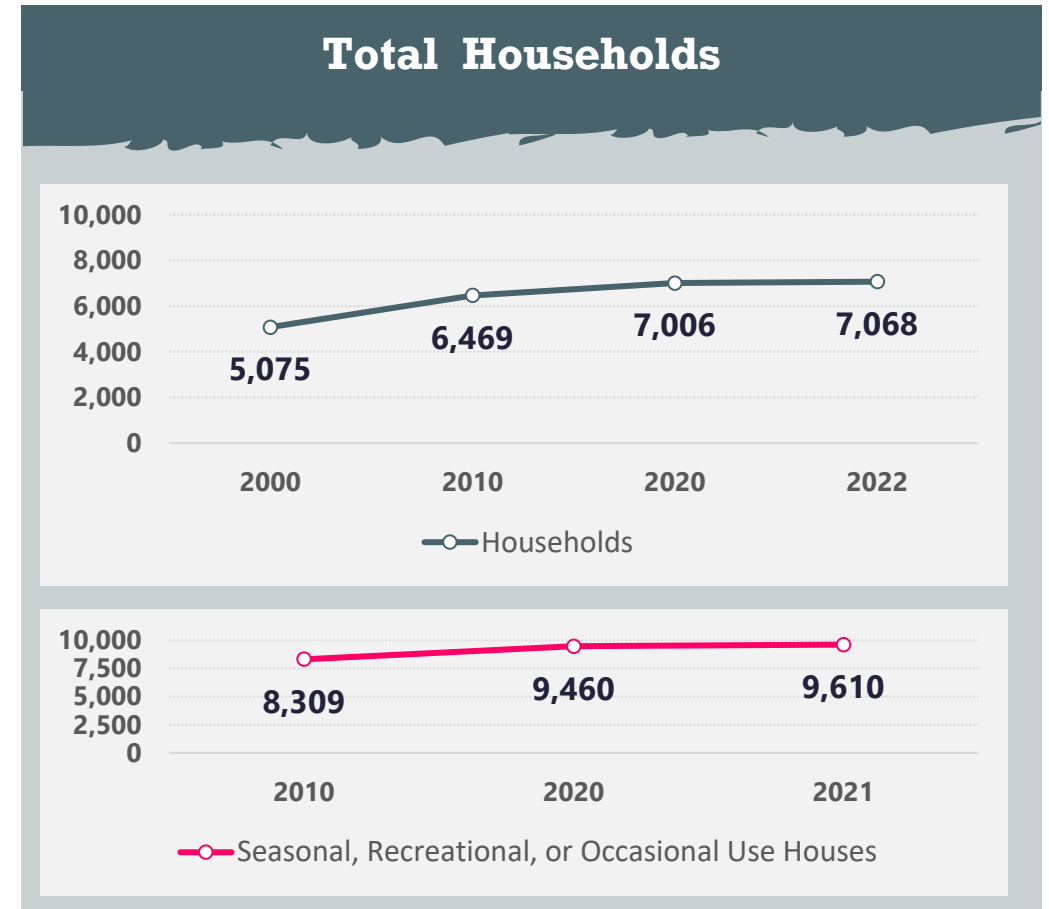
Housing

## The number of households is growing each year.

Seasonal housing is, too: up about 1,300 houses since 2010. While the price of homes continues to increase, the average income remains stagnant.

**Median income for families (2021): \$69,353**

Source: US Census Bureau 2010-2021: ACS 5-Year Estimates



Community



Economy



Housing



# Current Marketplace

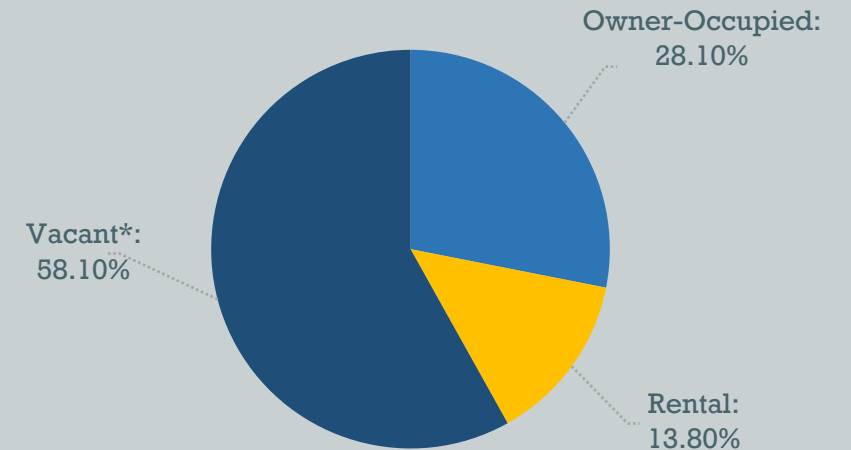
## Median Home Sale Price (May 2023 listings)

✓ **\$775,000** **↑ 10.6%** Since Last Year

## Average Days on Market

✓ **109 Days** Compared to **↓ 38** Days Last Year

## Housing Occupancy (2022)



**Total Housing Units: 16,873**

\*Vacant includes seasonal, recreational, and occasional use.

Sources: ESRI, US Census Bureau, MWCCOG 2004, Redfin [accessed May 2023]



Community



Economy



Housing

# Attainable Housing

**11% of all households in Grand County spend more than 50% of their income on housing.**

According to the Department of Housing and Urban Development, a household should spend no more than 30% of its income on housing costs.

Source: Colorado Housing Authority, HUD 2023

Affordable Housing Locations	Units	Location
Wapiti Meadow Townhomes	50	Fraser
Grand Living Solar Senior Homes	24	Granby
Smith Creek Crossing	12	Granby
Mary Drive Mixed Use Development		Grand Lake
Portal Crossing Attainable Units (Upcoming) Local Employee Residence Program	6	Grand Lake
Art Space/Space to Create in Grand Lake Affordable Spaces for Artists		Grand Lake
Silver Spruce Apartments	20	Kremmling
Hideaway Junction For Local Workforce	10	Winter Park
Hideaway Apartments For Local Workforce	38	Winter Park
Fireside Creek Apartments (Upcoming) For Local Workforce	50	Winter Park
Hideaway Junction Phase II (Upcoming) For Local Workforce	20	Winter Park



Community



Economy



Housing



# Where It's Happening IN GRAND COUNTY

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GRAND COUNTY TOURISM  
REVITALIZATION PLAN

# Grand County Visitors

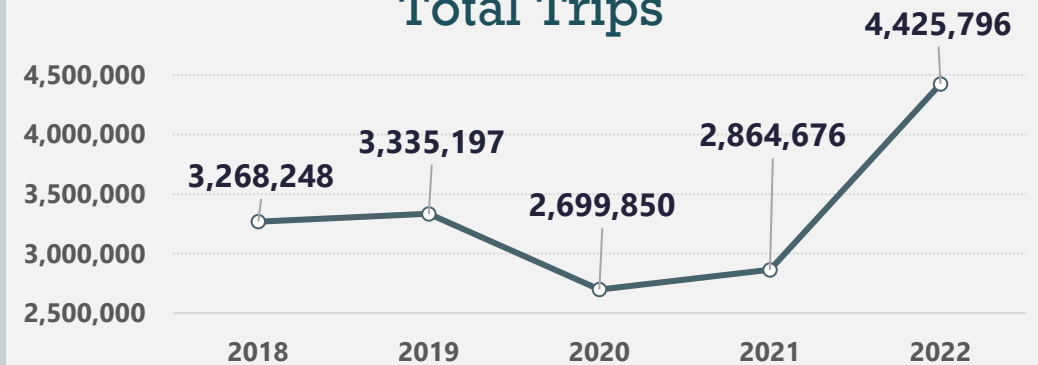
**The majority of visitors to Grand County come during summer months.**

Despite a considerable dip in visitors during the pandemic, there has been an overall increase in visitors since 2018. **April is the least visited month of the year.**

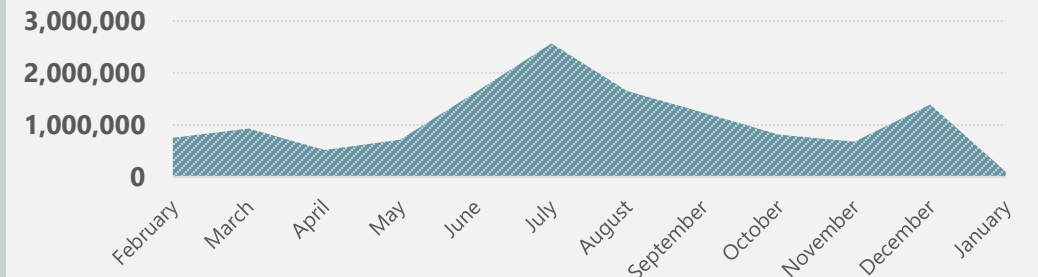
Source: Datafy 2018-2022 Datasets

## Visitor Data

### Total Trips



### Average Monthly Volume by Visitor Days



# Seasonal Activities

## Grand Lake

### Main Attractions

- ✓ Rocky Mountain National Park
- ✓ Trail Ridge Road
- ✓ Arapaho National Forest
- ✓ Grand Lake Shadow Mountain Lake

### Main Activities

- ✓ Hiking
- ✓ Camping
- ✓ Boating
- ✓ Sight Seeing
- ✓ Fishing

**678,147**

Total Trips in 2022

## Kremmling

### Main Attractions

- ✓ Wolford Mountain
- ✓ Williams Fork
- ✓ Gore Valley
- ✓ Latiago Ranch
- ✓ Bluebird Backcountry

### Main Activities

- ✓ Hiking
- ✓ Camping
- ✓ Hunting
- ✓ Birding
- ✓ Fishing
- ✓ Rafting/Kayaking

**534,939**

Total Trips in 2022

## Granby

### Main Attractions

- ✓ Arapaho and Roosevelt National Forests
- ✓ Granby to Fraser Trail
- ✓ Lake Granby
- ✓ YMCA of the Rockies

### Main Activities

- ✓ Rafting/Kayaking
- ✓ Hiking
- ✓ Biking
- ✓ Horseback
- ✓ Riding
- ✓ Camping
- ✓ Fishing

**1,146,989**

Total Trips in 2022

# Seasonal Activities

## Winter Park

### Main Attractions

- ✓ Winter Park Resort
- ✓ Grand Adventures
- ✓ Hideaway Park
- ✓ Vasquez Peak

### Main Activities

- ✓ Skiing
- ✓ Snowmobiling
- ✓ Snowshoeing
- ✓ Sledding/Tubing

**887,597**

Total Trips in 2022

## Hot Sulphur Springs

### Main Attractions

- ✓ Hot Sulphur Springs Resort and Spa
- ✓ Pioneer Park
- ✓ Hot Sulphur Springs State Wildlife Area

### Main Activities

- ✓ Hot Springs
- ✓ ATV/OHV
- ✓ Wildlife Viewing
- ✓ Snowshoeing

**70,494**

Total Trips in 2022

## Fraser/Tabernash

### Main Attractions

- ✓ Confluence Park
- ✓ Fraser River Trail
- ✓ Fraser Tubing Hill
- ✓ Colorado Adventure Park
- ✓ Fraser to Granby Trail

### Main Activities

- ✓ Sledding/Tubing
- ✓ Ice Skating
- ✓ Skiing
- ✓ Snowmobiling
- ✓ Snowshoeing

**663,748**

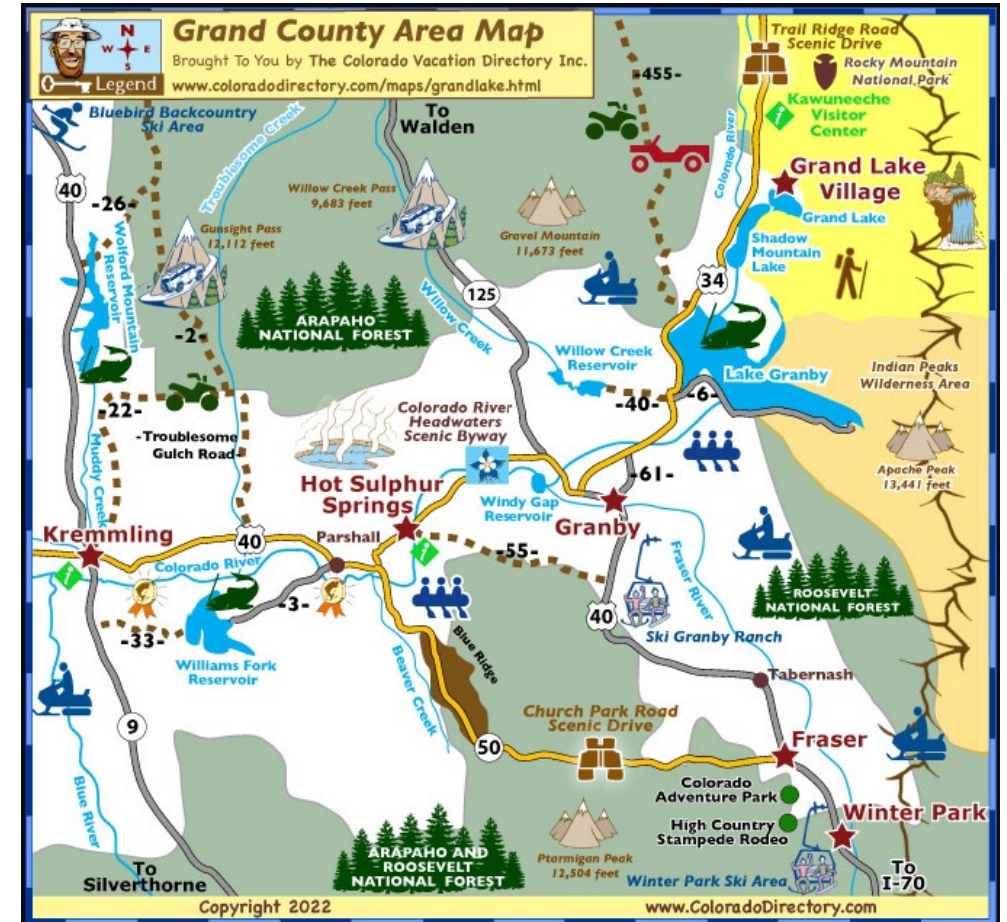
Total Trips in 2022

# Overall Tourism Map

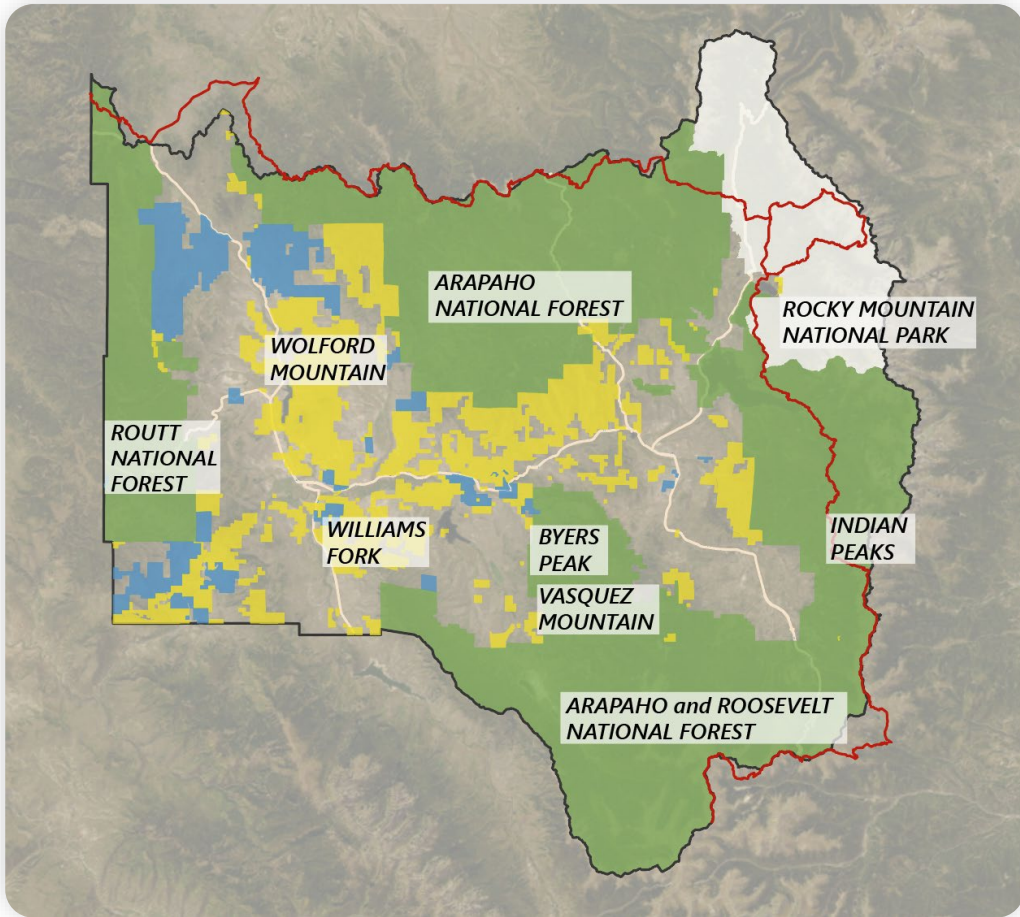
**The diversity of activities throughout the county is abundant and widespread.**

This map from the Colorado Vacation Directory highlights the main activities throughout Grand County as well as many of the natural areas.

Source: *The Colorado Vacation Directory (2022)*



# Federal and State Areas



■ United States Forest Service   
 ■ Federally Owned   
 — Continental Divide Trail  
■ National Park Service   
 ■ State Owned

## Over 750+ Federal/Public Campsites

### Main Activities:



Hiking



Camping



Sightseeing



Fishing

### Dispersed Camping Allowed in:

- ✓ Vasquez, Williams Fork, and Byers Peak

### RVs allowed at:

- ✓ Rocky Mountain National Park, Arapahoe, Williams Fork, Wolford Mountain Reservoir, Routt, and Indian Peaks (with limitations)

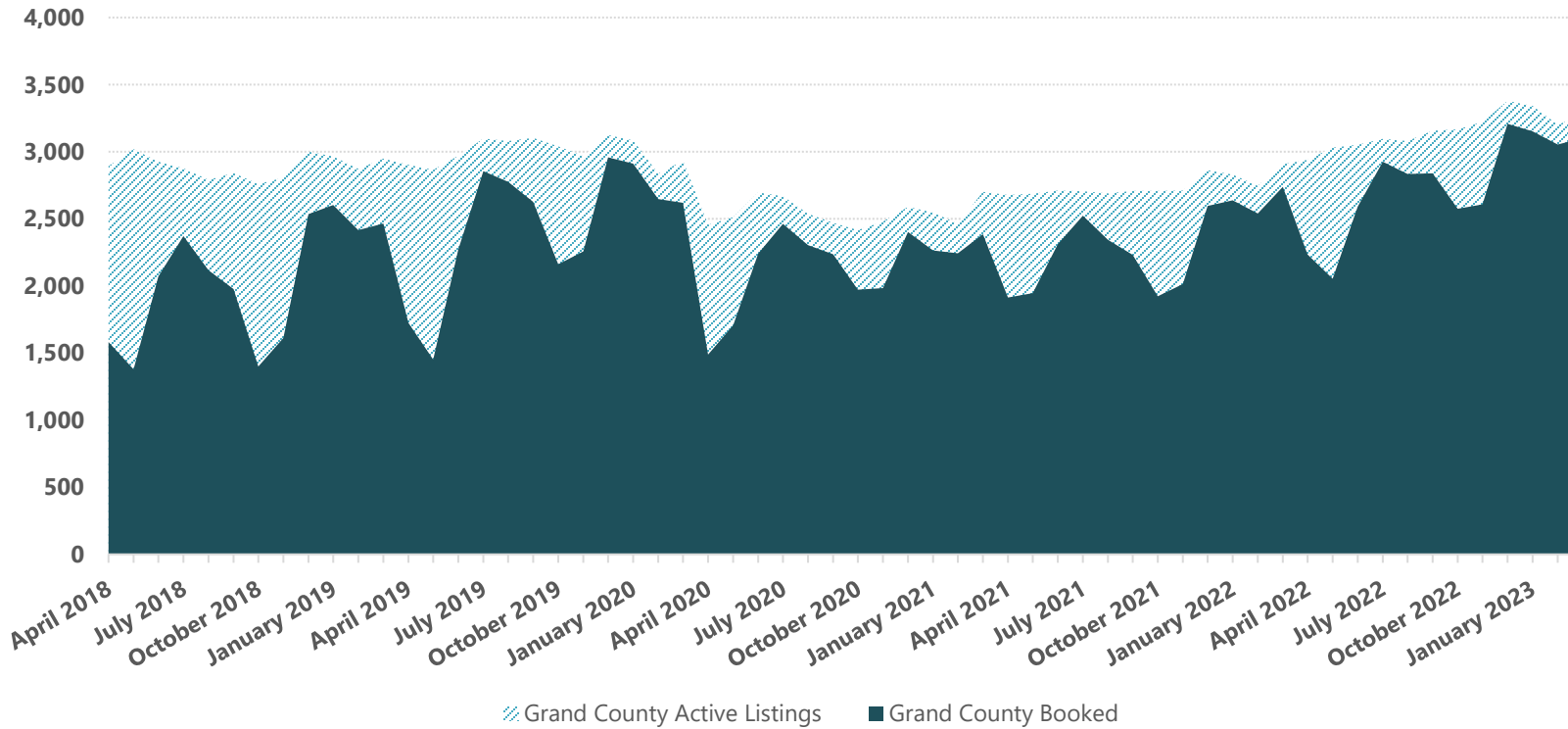
**Most camping sites are closed for winter except Moraine Park Campground at RMNP, Williams Fork for dispersed camping, and Wolford Mountain Reservoir**

Sources: US Forest Service, Bureau of Land Management, National Park Service, Grand County



# Short-Term Rentals

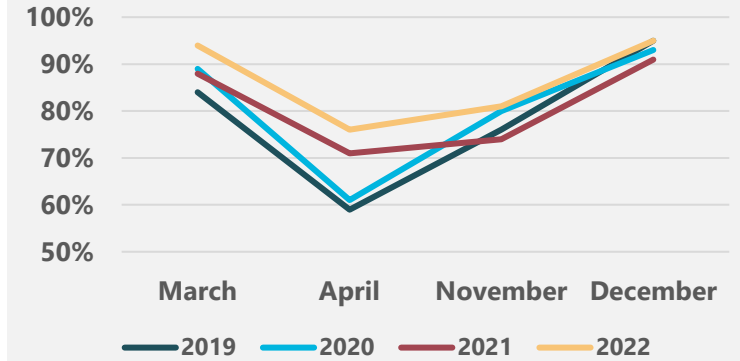
### Grand County STR Supply and Demand



<b>3,051</b> 2022 STR Active Listing Average	<b>2,650</b> 2022 STR Booked	<b>2,682</b> 2021 STR Active Listing Average	<b>2,226</b> 2021 STR Booked	<b>2,641</b> 2020 STR Active Listing Average	<b>2,249</b> 2020 STR Booked	<b>2,995</b> 2019 STR Active Listing Average	<b>2,382</b> 2019 STR Booked
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Source: AirDNA

### Percent Booked



Months	Supply Change (%)	Demand Change (%)
March to April 2019	-2%	-30%
November to December 2019	5%	31%
March to April 2020	-16%	-43%
November to December 2020	5%	21%
March to April 2021	-1%	-20%
November to December 2021	6%	29%
March to April 2022	1%	-18%
November to December 2022	5%	23%

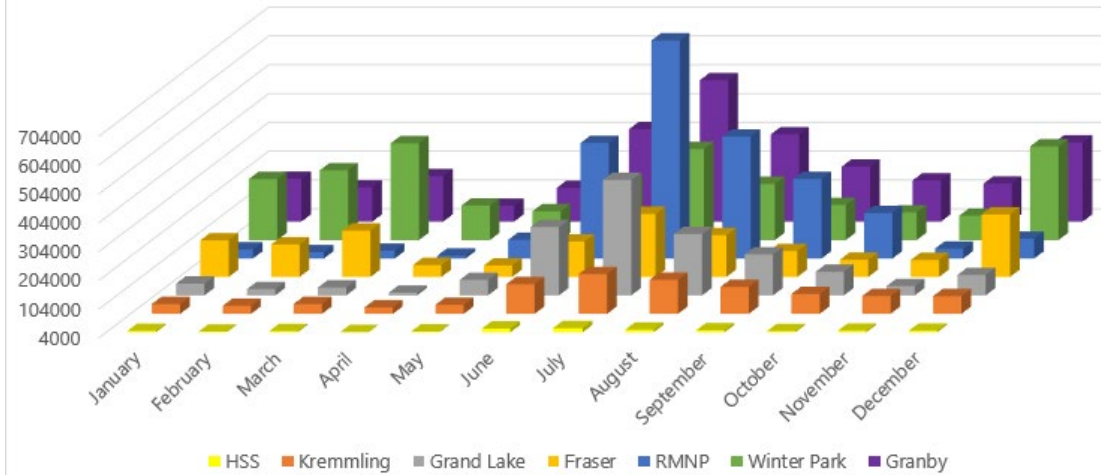
# Key Takeaways



Grand Lake visitorship  
mirrors Rocky Mountain  
National Park.

Granby had the highest  
visitor count in 2022.

Visitor-ship Comparison



April/May and  
October/November are  
the slowest months for  
Grand County visitorship.



Summer is the busiest  
season.

July is the busiest month.



Grand Lake, Granby, and  
Kremmling are busiest in  
the summer.



Fraser, Tabernash, and  
Winter Park are busiest in  
the winter.



Although tourism dipped  
during the pandemic,  
visitorship has surpassed  
pre-pandemic levels.



# Challenges IN GRAND COUNTY

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GRAND COUNTY TOURISM  
REVITALIZATION PLAN

# What We've Heard

GRAND COUNTY TOURISM  
REVITALIZATION PLAN



## Community

- × Environmental Concerns
- × Water Rights and Usage
- × Proximity to Health Care
- × Adequate and Available Daycare
  - × Community Identity
  - × Wayfinding
  - × Substance Abuse



## Economy

- × Staff Retention and Turnover
- × Business Fluctuations Based on Seasonality
  - × Lack of Hotels
- × Potential Development Along US-40
  - × Business Partnerships
  - × Raising Wages
  - × Diversifying Industry

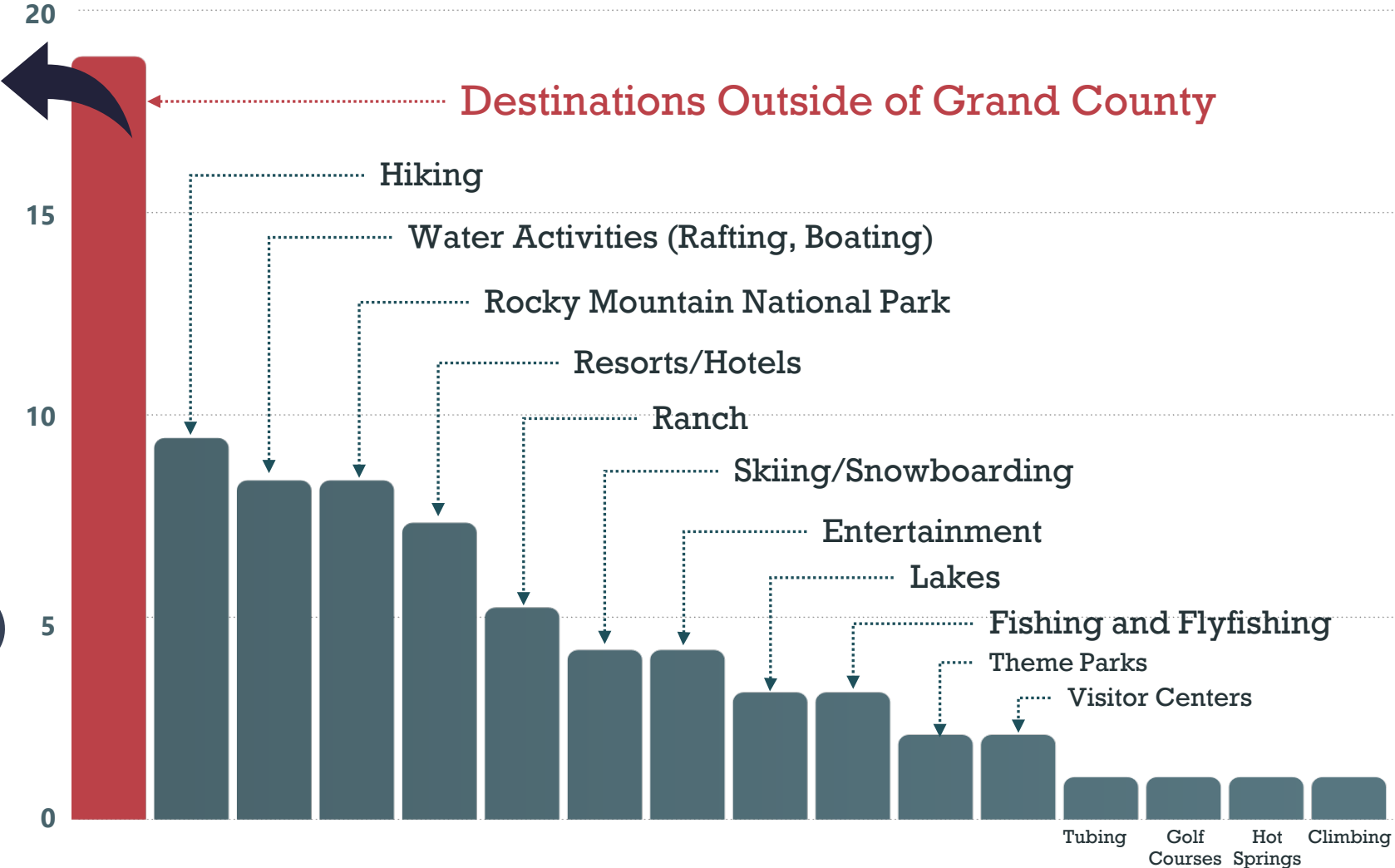


## Housing

- × Lack of Affordable Rental Options
  - × Lack of Affordable or Attainable Housing
- × Second Home Ownership
- × AirBNB and Online Short-Term Rentals
- × Permanent Housing Options
  - × Development of Additional Workforce Housing

# Website Analysis

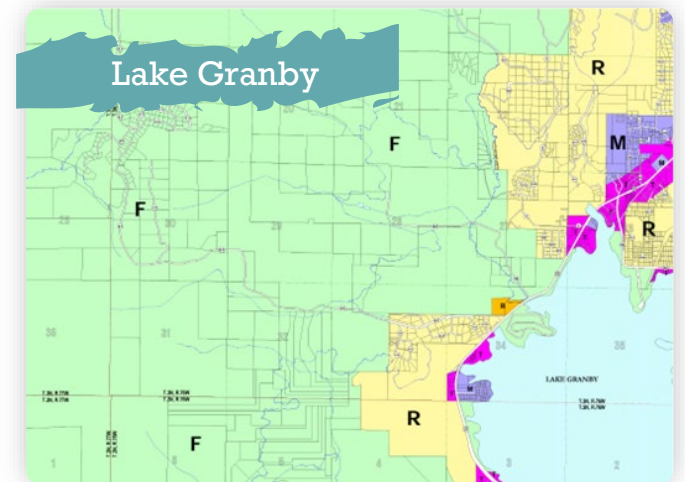
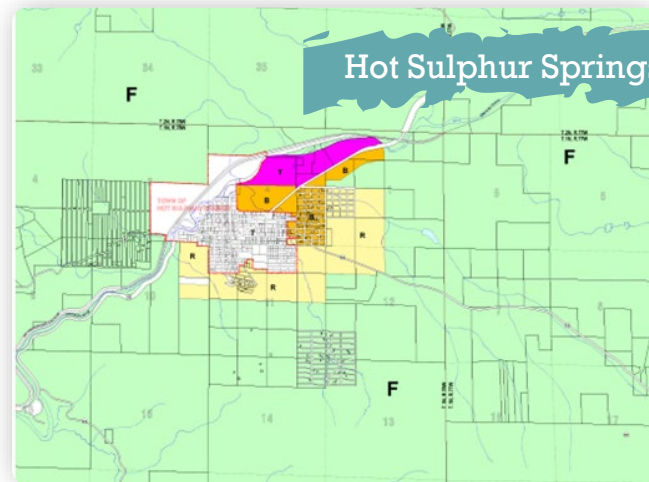
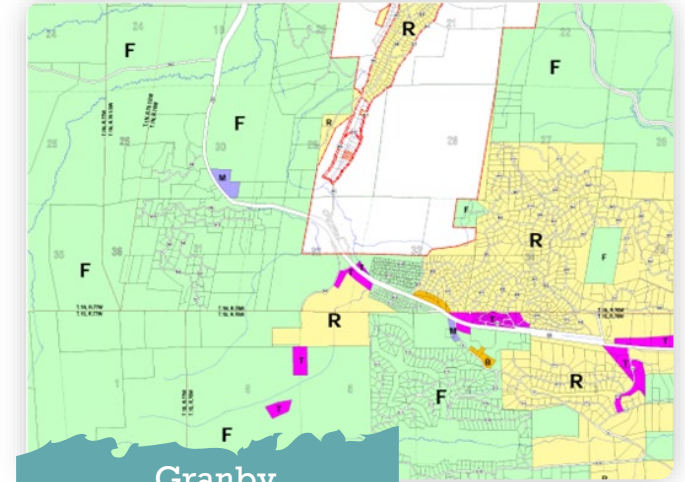
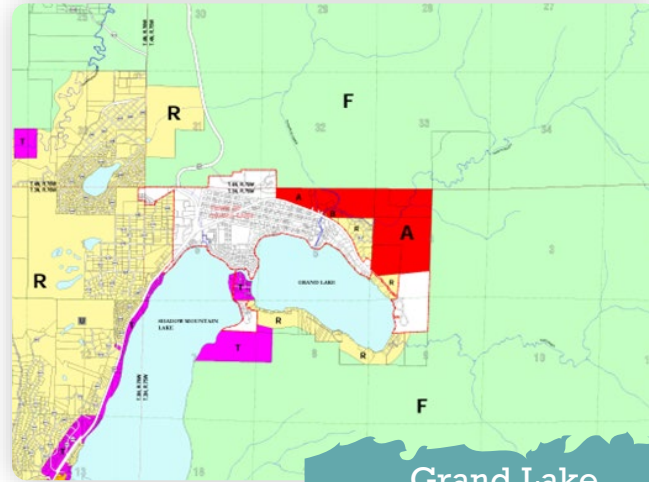
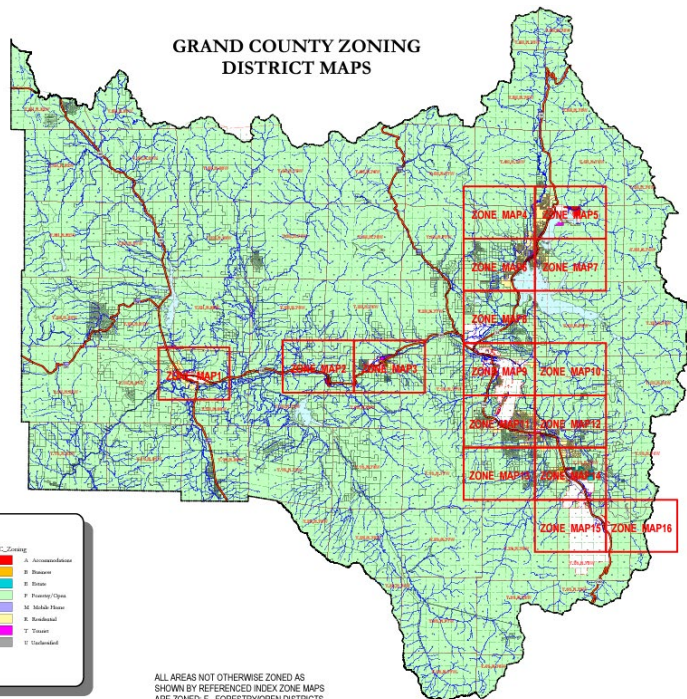
## Travel Website Searches



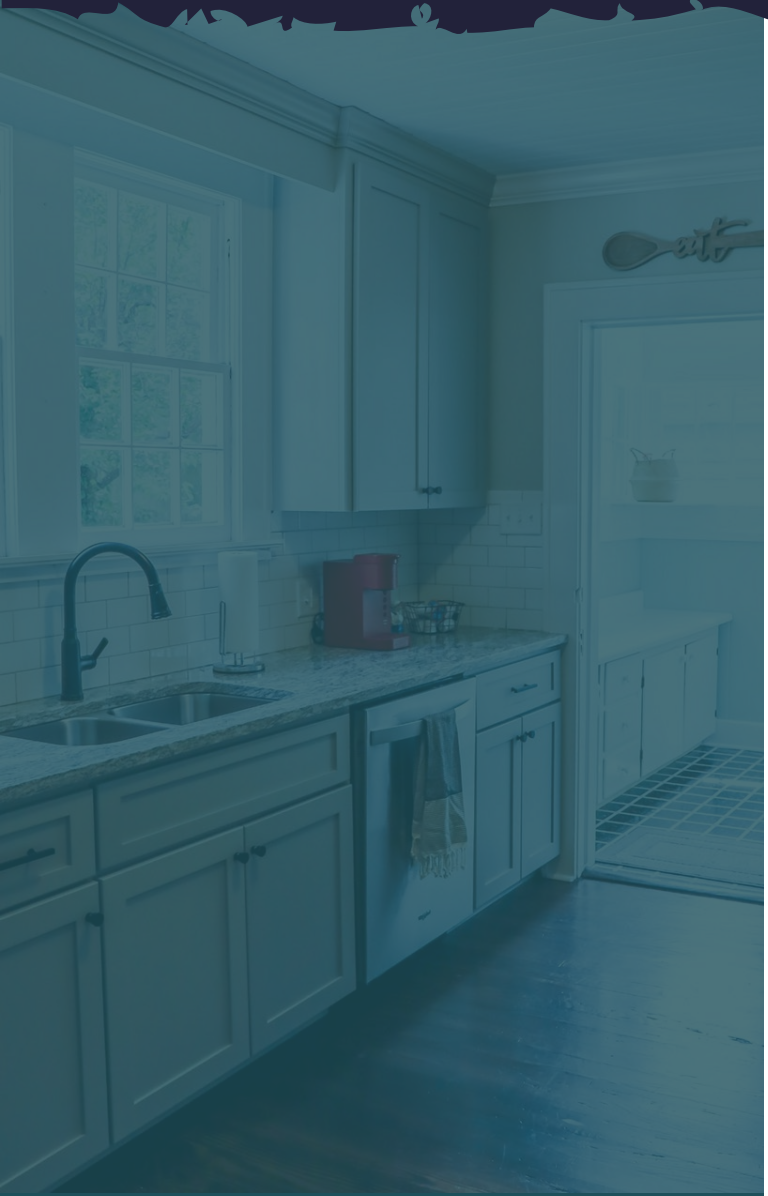
# Zoning

## Grand County Zoning disperses tourism throughout the county.

Additionally, there are several designations for future economic growth.



# STR Regulations



## Grand County

- ✓ Short-Term Rental Permit Renewed Annually: \$25/Occupant Listed

## Fraser

- ✓ Annual Application Fee of \$150
- ✓ Tiered STR Permit Fee:
  - ✓ \$150/Bedroom (2022-2023)
  - ✓ \$250/Bedroom (2023-2025)
  - ✓ \$250/Bedroom (2025-Thereafter)
- ✓ Business License Fee: \$40

## Winter Park

- ✓ Annual Short-Term Rental Permit Registration Fee: \$150
- ✓ Annual Business License Fee: \$60

## Kremmling

- ✓ No STR Regulations

## Granby

- ✓ One-Time Application Fee: \$150
- ✓ Annual Permit Fee Per Unit:
  - ✓ One Bedroom/Studio: \$200
  - ✓ Two Bedrooms: \$300
  - ✓ Three Bedrooms: \$400
  - ✓ Four+ Bedrooms: \$500

## Hot Sulphur Springs

- ✓ Business License Application Fee: \$50

## Grand Lake

- ✓ One-Time Application Fee: \$165
- ✓ Annual Nightly Rental License Fee:
  - ✓ 1-4 Person Occupancy: \$600
  - ✓ 4-8 Person Occupancy: \$750
  - ✓ 9+ Person Occupancy: \$900



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